PALEY ROTHMAN
ATTORNEYS AT LAW

Mon Dieu - Navigating Private Client Planning In France

Paul Marcotte moderated a Webinar and live presentation for the Society of Trust and Estate Practitioners (STEP) on November 21, 2019.

The presentation focused on French citizens who live or own property in the United States, U.S. citizens who own assets in France, and U.S. citizens living in France. It also provided an overview of French inheritance and gift tax systems, the French tax regime and special reporting requirements for trusts, and the US-France estate and inheritance tax treaty as updated by 2006 Protocol to Provide Relief from TAMRA changes. Finally, the presenters covered planning opportunities and pitfalls.

Paul Chairs the firm’s Tax practice group and is a member of its Estate Planning, Estate & Trust Administration and Nonprofit groups. He is the current Chair of the STEP Mid-Atlantic Branch.

 | 4800 Hampden Lane, 6th Floor, Bethesda, MD 20814-2930 | 301-656-7603 | 301-654-7354 fax